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contents

3. **President's Message**
4. **Editor's Column**
5. **Homeschoolers at the Public Library: Are Library Services and Policies Keeping Pace?** / by Amy McCarthy & Deborah Lines Andersen.
45. **Background Checks: Hiring Library Staff in the Age of Anxiety** / by Susan E. Werner and Colleen Kenefick.
52. **Advancing Information Literacy Assessment as a Collaborative Practice** / by Thomas Mackey.
64. **Mission Possible: Dealing Effectively with the Explosive Customer** / by Peter Lisker.
70. **PILOT Payments: a potential revenue source for public libraries** / by Jerry Nichols.
75. **Book Review: Leadership Basics for Librarians and Information Professionals** / by G. Edward Evans and Patricia Layzell Ward. Reviewed by Ed Falcone.

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President's Message

JLAMS, the electronic Journal of the Library Administration and Management Section of the New York Library Association, celebrates its third anniversary this year, and as LAMS President, I'm privileged to introduce the Spring 2007 JLAMS.



JLAMS provides a valuable outlet for the dissemination of articles, academic papers, and essays of interest to administrators and managers of all types of libraries: academic, public, school and special libraries. As administrators and managers, we have a lot in common, but we have few places to share what we know. JLAMS was the first peer-reviewed journal in NYLA, and the goal was to set a high standard for future publications.

Readers of JLAMS are well-served by the fine work done by Editor Richard Naylor and his team of referees, as are those whose contributions are published here. Submissions are always welcome. For information on article submissions, editorial policy, a submission form and more, visit the JLAMS website page at

http://www.nyla.org/index.php?page_id=813.

JLAMS is made possible by NYLA membership. LAMS receives funding based upon the number of people who select LAMS as their primary NYLA section, as well as by those who pay an additional \$5.00 to add LAMS as a secondary section. Please keep this in mind when renewing your NYLA membership. And thanks for your support!

JLAMS



Richard Naylor

Welcome to the fourth issue of JLAMS. In this issue we lead off with a research article on Home Schooling, a reality that is sometimes greater than is apparent. The stated purpose of the article is to narrow the divide between library services to the population and the actual needs of the homeschoolers.

In this issue we are also pleased to present helpful information on an HR function that is probably honored more in the breach, i.e. background checks. The potential of better background checks seems to be not only a great savings to libraries in terms of employee performance but also in fairness to those applicants who present an accurate picture of themselves.

Our third peer reviewed article is on the assessment of Information Literacy skills and it presents a great overview of the topic as well as some conclusions of case studies.

We also have an editors choice article on handling difficult, emotional interactions with patrons. Here the benefit is totally obvious. The suggestions and models presented provide a good point for contemplation and learning that can help us all better manage difficult interactions.

Once again we must thank our authors for their hard work and creative writing without which we would have nothing to publish. We are all very busy and they have responded to a request for even more effort.

We must also thank our referees who reviewed the articles and made suggestions for improvement. We have had the help of excellent people from throughout the state. The peer review process is an important part of the writing, as it enriches and improves the ideas put forth, and as it suggests areas for further research.

We invite all librarians and information science professionals in our state to submit articles and ideas for articles and we again ask for your help by volunteering to be a referee.

We invite all librarians and information science professionals in our state to submit articles and ideas for articles and we again ask for your help by volunteering to be a referee. Let's keep JLAMS going!

Richard Naylor
JLAMS Editor

Homeschoolers at the Public Library: Are Library Services and Policies Keeping Pace?

Amy McCarthy &
Deborah Lines Andersen

Abstract

Homeschoolers are a resourceful, fast-growing segment of the population. Their service, programming, material, and technology needs are similar to those of other patrons of the public library, but uniquely different in terms of intensity and focus. These differences present unique challenges for public libraries. This research presents the results of two surveys that examined the relationship between homeschoolers and the public library. The first survey asked public librarians about the impact of homeschoolers on public libraries in the Capital District of New York State. The second survey asked homeschoolers from the same region about their library use patterns as well as service needs. Homeschoolers were not placing undue service demands on public libraries, and, in fact, appear to be a service area awaiting development.

Overview

There was a time when homeschoolers would be reluctant to take their children out of the house during school hours for fear of suspicious neighbors reporting them for keeping their children out of school. Nowadays, however, with

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The authors would like to thank Barbara Gillen, Karen Cannell, and Nicole Docteur, former MSIS students who played various roles throughout this project.

homeschooling legal in all 50 states, the general public is coming to accept homeschooling as a viable option for educating children. These days *homeschooling* is almost a misnomer as one finds typical homeschoolers in all facets of the community including participating in art, gym, music, swimming, and skating classes; visiting museums; and volunteering in nursing homes and libraries.

This paper examines the effects of homeschooling on public libraries in the Capital Region of New York State. Two surveys were administered, one to public librarians and one to homeschoolers in the area. The first survey examined librarians' perceptions of the needs of homeschoolers. The second survey sought to determine the actual needs of this target population so as to inform the librarians.

Specifically, the studies were designed to work together to assess and describe:

- The amount of time librarians devoted to serving homeschooling families;
- Types of materials requested by homeschooling families;
- Number of new materials public libraries purchased at the request of homeschooling families;
- New programming ideas being developed for homeschooling families;
- How technology affects homeschoolers' use of the public library;
- How affiliation with homeschooling organizations affects homeschoolers' use of the public library.

Historical Perspective

During the Industrial Revolution, at the beginning of the 19th century, this country became a pluralistic society. Social and religious leaders were very concerned about the numerous religions, languages, and definitions of morality that existed. Faced with the passage of more stringent child labor laws, it was decided that universal public schooling would become the new shared-consciousness or morality. It would become the new-shared religion allowing for the transmission of newly coded societal norms.

In the 1840s children typically attended school for about three months of the year, for three or four years. **[1]** In 1860 this country had 300 public high schools. By 1900 that number had risen to almost 6,000. **[2]** As the number of schools increased so did the bureaucracy of running the schools. "The period between the 1840s and 1880s witnessed the successes of reformers with the consolidation of district schools, the rise of state commissioners and superintendents of education, and standardization of text books." **[3]** What began as an attempt to bring a country together through public schooling ultimately served to divorce parents from the work of educating their children, as had been the custom only a generation earlier.

During the latter half of the 19th century, due to large influxes of donated money from entrepreneurs such as Andrew Carnegie, public libraries were expanding rapidly, similar to the growth experienced by public schools. Libraries were touting themselves as the tool by which uneducated citizens and newly arrived immigrants would gain access to training and assimilation into American society.

In 1876, there were 188 public libraries in the United States. By 1913 there were 3,562 libraries with holdings of 1,000 volumes or more. From 1886 to 1917 Carnegie himself donated \$41 million to the cause for building public libraries in 1,420 cities and towns. **[4]** Librarians at the time saw themselves as educators to the masses. Libraries were the "people's university." **[5]** It is this long history of encouraging patrons toward self-directed learning that makes libraries a perfect fit for modern-day homeschoolers.

During the years between the Industrial Revolution and now, public schools became less personalized and more conservative in nature. In the early 1960s popular culture was turning away from this strict conservatism, and parents began to think that there must be a better way to educate their children. In 1964 John Holt, a schoolteacher in a private school in Boston, wrote *How Children Fail*, which helped to illuminate the problems inside the classroom. Holt believed that time in the classroom squashed children's innate desire to learn and taught them instead to fear, among other things, failing themselves and "the many anxious adults around them." **[6]**

Holt's writings exhort teachers and parents to trust the children to learn without being formally taught. This philosophy eventually became known as "unschooling." Holt's secular views were embraced by what Van Galen calls the pedagogues of homeschooling. **[7]** These parents encourage their children to engage in self-directed learning in which the parents act more as tour guides than as traditional teachers.

Seeing the social paradigm shift toward more liberal views, some conservative Christian parents began looking for alternatives. Although there was an increase in the number of Christian schools in the 1980s, some parents decided to eschew traditional schooling altogether and chose homeschooling. Ideologues felt called to homeschooling as a reaction to the perceived loss of moral values being experienced in the schools.

Raymond and Dorothy Moore, with their first book, *Better Late than Early*, were early proponents of this movement. [8] The Moores went on to write *School Can Wait* in which they advocated putting off formal schooling until the child reaches an integrated maturity level, usually between 8 and 10 years old. [9] This approach to education was interwoven with their Christian ideology. As compared to unschoolers, many parents homeschooling for religious purposes tend to follow a more strict school-at-home philosophy.

A Note About Terminology

Many terms have been associated with homeschooling over the years. Home education, home learning, and home schooling are just a few. When searching for materials on this subject through library catalogs, it is important to know which term the library uses. The Library of Congress has settled on "Home Schooling," as have the three library systems talked about in this article. However, most recent literature on the subject uses the term "Homeschooling." [10] This term along with its variations (homeschooler, homeschooled, etc.) will be used in this article.

Motivations

There are as many motivating factors for homeschooling as there are families who chose it. However, recent literature has found there to be four major categories of motivation including: dissatisfaction with the state of public schools (safety), concerns about academics (testing), religious imperatives, and family situation (special needs). [11] Most recently, parents' concern about the state of public schools has supplanted religious concerns as a primary motivator for homeschooling. [12]

According to the literature, most homeschooled children are elementary aged and then a large portion enters traditional school settings for high school. This could stem from the student's curiosity or the parent's concern about being able to provide the higher-level materials. However, some teens appear to be using homeschooling to fast track to college. Homeschooling permits motivated teens to finish high school coursework early allowing them to begin at a community college. [13]

Styles of Homeschooling

Although not necessarily evident during the reference interview, a broader understanding of the various styles of homeschooling will help librarians gain insight into their homeschooling patrons. **[14]** The more traditional school-at-homers use either a formal curriculum or create their own. They tend to teach each subject each day in a systematic format and normally use some form of grading and regular testing. Those that adhere to the Classical approach follow the trivium stages of development, which include the grammar stage (generally K - 4th grade), the logic stage (5th - 8th grade), and the rhetoric stage (9th - 12th grade). **[15]** The most-often referenced book on this topic is *The Well-Trained Mind: A Guide to Classical Education at Home* by Jessie Wise and Susan Wise Bauer.

Unit Studies attempt to integrate as many subjects as possible under one unifying theme. **[16]** For instance, a unit on chocolate might include History (what people first discovered the cacao bean and how was it prepared?), Geography (how far did cacao beans travel to become the treat we know it as today? where do cacao bean trees grow today?), Math (how much do various types of chocolate cost, per ounce?), Language arts (read *Charlie and the Chocolate Factory* by Roald Dahl, write stories and poems), Science (what role does the midge play in chocolate production? bake various chocolate desserts), Current affairs (controversies surrounding modern-day cacao bean harvesting), Field trips (to museums or local candy makers), culminating with a report on chocolate using various word processing and presentation creation tools.

Eclectic homeschoolers are best described as “middle-of-the-roaders.” They may approach some subjects systematically and yet handle others more informally, often depending upon learning styles or interest. **[17]** Unschooling is the most relaxed, interest-initiated approach. As advocated by the late John Holt, unschooling gives parents permission to trust their children to learn by following their own interests. Indeed, a quotation from William Hull that opens Holt’s *How Children Fail* sums up the unschooling philosophy, “If we taught children to speak, they’d never learn.” **[18]** Of course, unschoolers realize that learning does not occur in a vacuum and therefore books and related materials are made available to the children, as necessary. **[19]**

Counting Homeschoolers

Homeschoolers are notoriously a difficult group to pin down. **[20, 21, 22, 23]** First, they do not meet in any one place. There is no central homeschooling clearinghouse. Second, they are circumspect of government agencies that could possibly intrude on their freedom to educate their children at home. Third, states

vary in their reporting requirements. That being said there are various accounts of just how many homeschoolers there presently are in the United States. The National Center for Education Statistics, [24] under the auspices of the U.S. Department of Education, recently reported that in 2003 there were 1.1 million homeschoolers in the United States, making that 2.2% of the 50 million school aged children in the U.S. at that time. The National Home Education Research Institute (NHERI), affiliated with the Home School Legal Defense Association (HSLDA), has reported that there were 1.6 to 2 million homeschoolers in the U.S. from 2001 to 2002. [25] This would be 3.2 to 4% of the total school age population. The U.S. Census Bureau states that there were 3.1 million elementary and secondary students in New York State in 2005. [26] According to an electronic communication with a representative for the New York State Education Department there were 18,197 homeschooled children in New York State from 2005 to 2006, making this .6% of the entire school age population. [27]

Homeschoolers and Public Libraries

Homeschoolers rely heavily on public libraries. That is no surprise. As Brostrom states, “[l]ibraries are to homeschoolers what brick and mortar school buildings are to public school students.” [28] Indeed, a recent national study found that 78% of homeschoolers routinely use public libraries for curricular support. [29] Other studies have found slightly higher results: 86% use the library for curricular support and 93% visit the library either weekly or monthly. [30]

As opposed to homeschoolers, traditionally schooled children and their parents have an additional layer of materials and resources at their disposal, the school library. Therefore, the materials and programs available through the public library become crucial to homeschoolers who are typically living with a single income. [31]

The types of materials and services that homeschoolers seek from libraries are the same that all patrons want. They want their needs to be considered and respected by library staff. Unfortunately, some librarians sit in judgment of the validity of homeschooling as an education option. This prejudice affects their ability to service this population. Comments to patrons in the library with school age children during school hours such as, “Why aren’t you in school?” do not serve to create an environment of trust. [32]

Teachers garner special borrowing privileges in most libraries. Teachers use libraries to supplement lessons as well as classroom collections. Normally, teachers can borrow materials for six weeks as opposed to the normal four, and

they can renew these items. Libraries that consider homeschoolers as educators have extended these borrowing privileges to homeschoolers. **[33, 34, 35]**

Homeschooling parents differ from traditional educators in that they are often teaching multiple ages. Homeschoolers need materials on topics for various ages so that all the children in the family can learn together. **[36]** These materials will usually include non-fiction, biographies, historical fiction, and educational videos and DVDs. Materials on teaching styles and philosophies are much sought after by homeschoolers, as is a designated homeschool binder at the library containing information on local groups, state regulations, curriculum guides, resource catalogs, and guides for beginner homeschoolers. **[37, 38, 39, 40, 41]**

Two programming factors for homeschoolers are age restrictions and the time of day. Homeschooled children are accustomed to multi-aged learning environments. Therefore, libraries that recognize this unique trait among homeschoolers offer multi-age or family programs. **[42]** Libraries that have directed programming to homeschoolers have found book discussions and information literacy classes during the day to meet homeschoolers' needs. **[43, 44, 45, 46]**

Inexpensive ways that libraries are helping homeschoolers include: spaces to display their work, subscriptions to homeschooling magazines, information on colleges and standardized tests, or the availability of librarians as test proctors. With grant funding, libraries have purchased science equipment and math manipulatives, and arranged to have a homeschooling experts speak at the library. **[47, 48, 49]**

Homeschooling groups are frequently looking for free, amenable meeting places. During warm weather, a neighborhood park will suffice. Cold or inclement weather demands that a reliable indoor space be secured. Libraries that provide space for homeschooling groups to meet year round have alleviated the problems associated with seasonally inappropriate spaces. **[50, 51, 52]**

Benefits of Working with Homeschoolers

Socialization is frequently mentioned as a major concern facing homeschoolers. However, an argument in favor of homeschooling would point out that, in fact, the multi-age, multi-skill level of many homeschoolers' learning environments mimics the real world job environment. The skills of self-discipline and initiative are traits that future employers will value. **[53]**

Homeschoolers represent a unique audience for librarians. The students are not tied to a school curriculum and therefore are not likely to request all the same materials required by the traditionally schooled children in the district. In addition, their work is so individualized that their requests do not indicate a future deluge for similar requests. This allows for greater flexibility and creativity on the part of the librarians. [54, 55] Homeschoolers who are interested in volunteering have come to see the library as an accepting organization for these efforts. The benefits of using homeschoolers as library volunteers include availability to work during the day and the ability to write reviews of books that would appeal to homeschoolers. [56]

According to a librarian quoted by Brostrom:

I feel homeschoolers have done as much for the library as we have done for them. They provide us with homeschooling information for the public, present workshops on various homeschooling topics, and use the library as a showcase for displays. They also present programs during National Library Week and on other special occasions (some are on the arts, others on educational issues). [57]

Challenges Working with Homeschoolers

Homeschoolers tend to study a topic in-depth. They will therefore likely go through all the materials the local library has available and then request more. This problem can be two-fold. First, patrons who routinely wipe out the library's collection on various topics leave little for others. [58] Second, constant requests for interlibrary loan (ILL) materials can potentially be expensive for the library. [59] A more recent look at this topic is necessary. With most library catalogs available online, patrons are able to request materials themselves. However, it is possible that patrons will request even more materials than in the past and therefore further tax the circulation department or increase expenses associated with courier services.

Homeschoolers frequently request purchases or interlibrary loan of items that are out-of-print or out-of-date. Some curriculums used by homeschoolers use specific titles that are no longer available. Librarians at times run into resistance when they try to substitute more current books on a topic. A librarian quoted by Brostrom felt constrained by the patron requests that fell outside of the library's collection development policy, "[b]ut they wanted those particular titles so I was restrained in pointing out weaknesses. Some examples were: a history book published in the 1940s, and a controversial, self-published AIDS book." [60] Librarians in these cases have learned that patrons can be offended by

substitutions or by pointing out that other more up-to-date materials exist within the library.

Right or wrong, homeschoolers have a reputation for being quick to censor, challenge, or request reconsideration on library materials that do not fit with their personal or religious beliefs. Either the threat or reality of censorship can make librarians hesitant to work with homeschoolers. A call for reconsideration on a book can be a wake-up call to librarians. In fact, many librarians self-censor items they purchase so as to stave off a censorial cry. [61] When homeschoolers and librarians discuss collection development policies there tends to be less instances of censorship. This way homeschoolers have a better understanding of the mission of the library. This leads to a greater appreciation as to why librarians are reluctant to purchase out-of-date materials for the collection and may head off a potential censorship situation. [62]

Homeschool Resource Center: A Library Case in Point

The Johnsburg (IL) Public Library has created an extensive resource center for homeschoolers in the state. Any homeschooler, indeed any patron, with an Illinois library card can borrow from the Homeschool Resource Center (HRC). This center, the dream of just about any homeschooler, was the particular dream of Kathy Wentz, a homeschooling mother for 15 years and former science teacher. Wentz relayed her dream to the library's director, Maria Zawacki who thought the idea sounded good enough for funding. Once a funding source was found in 2001, the library sent a survey to the local homeschooling groups, and received 112 responses. Eighty-four percent of respondents indicated their intention to homeschool through high school. This showed a committed number of patrons needing materials for this older, more difficult-to-serve age range. [63, 64]

In the end, the library was awarded a \$55,000 one-time grant from the Illinois State Library, with monies also coming from the federal Library Services and Technology Act. With this grant, the library was able to purchase curriculum materials, science equipment including three microscopes, two telescopes, and scales, math manipulatives, educational games and kits, software, books and other print materials. Included in the purchases were 3-year subscriptions to 22 homeschooling magazines and newsletters, textbooks covering subjects such as math, reading, spelling, science, and social studies for eight grade levels, and 37 foreign language materials. All materials in the HRC could be checked out for six weeks and renewable for another six weeks. Sources for the title selections came from Susan Scheps' *The Librarian's Guide to Homeschooling Resources* and Rebecca Rupp's *The Complete Home Learning Source Book*. [65, 66]

Since this grant was for a one-time purchase of materials, any subsequent purchases had to come from monies obtained through fund-raising and donations. One way the library decided to save future costs was to only renew magazine subscriptions with the highest circulation. One year after opening, the circulation of the materials in the HRC accounted for 6.5% of total library circulation. [67, 68]

The Surveys

After a review of recent literature that relates to homeschooling and libraries, this article now focuses on new research in the field – the culmination of two surveys conducted two years apart. The questions raised by the initial 2002 survey to the public libraries informed the second 2004 survey to homeschoolers.

Methodology I: The Librarian's Perspective

As noted above, homeschooling is a nationwide phenomenon. In order to look at policy issues within a sampling frame of reasonable size and demographic distribution, the authors chose to survey 47 public libraries and branch libraries in Albany, Rensselaer, Saratoga, and Schenectady counties of upstate New York. These libraries are governed by similar state and municipal laws, receive similar state funding, and, the authors hypothesized, all had some population of homeschooling families within their jurisdiction.

Survey Instrument: Public Libraries

The data collection instrument was a 17-item questionnaire designed to reflect areas of library service that were cited in the literature as frequently affected by the growth of homeschooling. (See Appendix A for the survey instrument.) The survey was created, pilot tested, and then sent with a cover letter in spring 2002 to the 47 public libraries. Librarians were asked to return the survey within two weeks of receiving it. Sixty-eight percent (32) returned their surveys. Of these, twenty-nine libraries reported having contact with homeschoolers in the previous twelve months. Three stated that they were not aware of homeschoolers using their resources. Thus, for the analysis that follows, the 29 respondent libraries form the basis for statistics and discussion, creating an effective response rate for the study of 61.7% of the 47 libraries.

The survey collected information on both the staffing of the library as well as demographic information of the homeschooling population it served. Librarians were asked whether programming and services provided for homeschoolers had changed or increased in the previous twelve months. Other variables included

computer instruction and use, materials requested, materials purchased, programs created or modified, and policies concerning homeschooling patrons.

Population and Sample: Public Libraries

Although all of the libraries in the survey are not a part of the same consortium, they are all members of various consortia in the area. All the libraries in Albany and Rensselaer counties are a part of the Upper Hudson Library System (UHLS). The libraries in Saratoga County are a part of the Southern Adirondack Library System (SALS) and the Schenectady county libraries are a part of the Mohawk Valley Library System (MVLS). SALS and MVLS have partnered to create the Joint Automation Project, which allows patrons access to all 57 libraries in both systems with a single library card. [69]

The Capital Region is comprised of urban, suburban, and rural communities. The greatest number of homeschooling families was reported in the suburban communities. Of the 29 respondent surveys, 26 answered the question regarding location. Half of these libraries (13) indicated homeschooling patrons residing in suburban areas, followed by 38% (10) with patrons from rural settings, and 27% (7) of libraries with patrons from urban settings. Several libraries indicated serving multiple populations. The urban, suburban, and rural divisions seen in the service populations may be nothing more than an artifact of the kinds of communities surveyed. Urban libraries tend to have urban patrons, and rural libraries tend to have rural patrons.

The most significant finding from this survey question may simply be that homeschooling families are nearly ubiquitous in service populations. Indeed, 91% (29 of 32) of libraries reported having some contact with homeschoolers in the previous twelve months. It is not possible to generalize from this sample to the rest of New York State, or to other regions of the United States, but the findings here created a good set of policy and service questions for present library management and for future research.

All thirty-two responding libraries, including those that did not report service to homeschoolers, estimated numbers of staff in their libraries. The public libraries in the Capital Region are of widely varying size as reflected in their counts of both professional and support staff. The number of full-time equivalent professional librarians reported ranging from zero to 25 with a modal response of one librarian. For support staff, including paraprofessionals and volunteers, the reported data were zero to 56, with a median of two and a mode of zero. These figures were important for this study since a small library, with one or two full time librarians, would have a much harder time meeting the needs of several

homeschooling families than would a large library with staff specifically devoted to reference, children's or young adult services.

Methodology II: The Homeschoolers' Perspective

Although the majority of libraries reported service to homeschoolers, the researchers recognized that homeschoolers are difficult to find. It was thought that the best way to reach the largest number of potential respondents would be through online listservs. In spring 2004, a call for homeschooling respondents was posted on the University at Albany, School of Information Science and Policy listserv (SISP-L). Members of SISP-L (present or former school students) forwarded the request to local homeschool listservs in the Capital Region.

Survey Instrument: Homeschoolers

The data collection instrument for homeschoolers was a 10-item questionnaire focused on the types of services local homeschoolers use and would like to see implemented in their local libraries. (See Appendix B for the survey instrument.) The entire survey was conducted through email. When a self-selected respondent agreed to participate in the survey he or she hit "reply," typed answers under the preformatted questions, and returned the email to the researchers. Additionally, participants were told to skip any question they did not want to answer. In fact, five questions were left unanswered by four participants. The answers were then stripped of the identifying email addresses and collated in a Word document. Participants were told that involvement in the survey was voluntary and that in the interest of privacy they should not mention the names of the children they homeschool.

The survey asked homeschoolers demographic information about length of time homeschooling, how many children they homeschooled, and number of current college-bound children. In addition, homeschoolers were asked about their library use, the types of library materials and services they use and would like to see implemented, how information technology had changed their interaction with the library, and how homeschooling-group affiliations had affected their library use.

Population and Sample: Homeschoolers

There were 28 respondents to the homeschooling survey, representing 63 children. Of these, 27 were current homeschooling parents and one was a young adult who had previously been homeschooled. The mean number of children being homeschooled in each family was 2.3. This corresponds with the research

that says that homeschooling families typically have 2 school-aged children and one younger child. [70] Seventy-nine percent (22) of homeschoolers reported participation in a homeschooling organization.

It is worth noting that most homeschooling parents come to see that, separate from school age designations, children are learning since birth. [71] Therefore, when the homeschoolers were asked how many years they had been homeschooling at least three respondents alluded to this dichotomy saying, for example, “[m]y child’s whole life, but you probably want me to indicate the number of ‘school’ years – which is 2, currently.” Most respondents gave a straight answer but it is difficult to determine how they were defining the question, making the responses to this question difficult to compare.

Findings

All of the public librarians were in agreement that their library had no system in place to track homeschoolers. Additionally, they reported having no delineated policies for service to homeschooling families. As a result, their responses to questions of numbers of patrons were based upon individual experience and recall of librarians. With that proviso in mind, it is noteworthy that all grade levels of homeschooling students appeared to make use of the public libraries in the study. Most notable was the 66% (19) of libraries that indicated high school level use of materials. Table 1 presents a complete set of responses to the grade level question, as presented by the librarians’ survey data.

Table 1 – Grade Levels of Homeschooling Patrons as Indicated by Public Libraries

Grade Levels/Age served by Public Libraries	Number of Libraries Responding	% of Libraries Responding
Preschool (under age 5)	22	76%
Kindergarten/Elementary school (ages 5–10)	28	97%
Middle School (ages 11–13)	26	90%
High School (ages 14 +)	19	66%

Mirroring the librarians' perception, 82% (23) of homeschoolers reported teaching children who were still in the preschool, elementary, or middle school age brackets. Eighteen percent (5) of families in the homeschooling survey reported a child either attending college or applying to college after being homeschooled. Three of these families reported students meeting with success after beginning community college during what would have been either their 10th or 11th grade years (if they had been traditionally schooled). One student reportedly received a \$10,000 scholarship to Rensselaer Polytechnic Institute, another was in the National Honor Society for Community Colleges, and a third was on her college's President's List for academic achievement.

Homeschoolers prove remarkably resourceful when it comes to acquiring necessary materials. A majority of homeschoolers, 68% (19), reported using more than one library regularly and 61% (17) reported using more than one public library. There was sizeable overlap in the types of libraries used, between the multiple public libraries, college libraries, the New York State Library, specialized libraries such as church or adoption agency libraries, vacation libraries, and a high school library. Table 2 presents the range of libraries used by homeschoolers.

Table 2 – Library Usage as Indicated by Homeschoolers

Type of Library Usage	Number of Homeschoolers Responding	% of Homeschoolers Responding
One Library	9	32%
More than one Library	19	68%
More than one Public Library	17	61%
College Library	4	14%
New York State Library	2	7%
Specialized Library (e.g., adoption agency, church)	2	7%

Vacation Library	2	7%
High School Library	1	4%

Service to Homeschoolers

One would expect that as the number of homeschooling families increases so would the service expectations on librarians. Due to the fact that libraries do not track the services provided to their patrons, it was difficult for librarians to estimate the total number of service hours provided each week to homeschooling patrons. In addition, homeschoolers do not necessarily self-identify when requesting materials or services through the library. Sixty-two percent (18) of the libraries did not report a perceived increase in service to homeschoolers over the previous twelve months. Twenty-one percent (6) of libraries did experience an increase in service needs over the same twelve months. Of these, one indicated pursuing a grant to handle the increased demands.

Libraries in the survey were asked about weekly hours of service provided to homeschoolers as well as any noted increase in the previous twelve months. Seventy-six percent (22) reported spending up to 2 hours per week with homeschoolers. Two respondents did not indicate time spent with homeschoolers. Fourteen percent (4) of libraries reported spending 3 to 5 hours per week with homeschoolers. Four percent (1) indicated spending 6 to 8 hours per week serving this population.

Homeschoolers, in general, did not specify how often they visited the library, making comparisons between the surveys difficult. Of those that gave any indication of the frequency of their library visits (7 respondents), five referred to weekly library visits, one to a visit every 10 days, and another to visiting the library 2 to 4 times per week.

Curricular Materials and Beyond

According to the Elementary, Middle, Secondary, and Continuing Education Department (EMSCE) within the New York State Education Department (NYSED), a homeschooled child is not considered to be attending a non-public school, and therefore districts are not obligated to supply homeschoolers with textbooks (as they are with privately schooled children). However, the EMSCE leaves the decision up to the individual districts to ultimately decide whether to lend

textbooks to homeschoolers. [72] Many homeschoolers would rather not borrow from the school district, or participate in any such program through state agencies, as that gives an impression of being beholding to these agencies. [73]

Twenty-four percent (7) of libraries reported being asked for curricular materials. This does not agree with the literature that says that 78% of homeschoolers overall use the public library for “curriculum or books.” [74] The surveyed homeschoolers were not asked directly about curricular use and the public library. It is easy to imagine that homeschoolers see all of their borrowing as supporting their curricula. Even comic books and gaming magazines have been mentioned in the literature as valid tools to use when teaching reading. [75] Most likely the discrepancy in reported curricular support requests stems from a narrow versus broad definition of what constitutes “curricular support.”

By far the most widely used resource reported by both the public librarians and the homeschoolers was books, 97% (28) and 93% (26) respectively. Based upon the literature, this is an intuitive finding. It would be interesting to explore why the remaining respondents in both surveys did not mention books as being used. There were discrepancies between the types of materials homeschoolers reported using against the materials that librarians reported them requesting. Only 29% (8) of homeschoolers reported using “reference” materials whereas 66% (19) of libraries reported homeschoolers requesting these materials. As stated previously, this may just be a matter of defining the terms. In addition, only one homeschooler mentioned using online full text articles however 41% (12) of librarians reported their use by homeschoolers. Table 3 indicates the materials most frequently requested by homeschoolers.

Table 3 – Types of Materials Requested by Homeschoolers as Indicated by Public Libraries and Homeschoolers

Type of Materials	Number of Libraries Responding	% of Libraries Responding	Number of Home-schoolers Responding	% of Homeschoolers Responding
Books	28	97%	26	93%
Reference	19	66%	8	29%
Films/Videos	15	52%	25	86%

Magazines	12	41%	14	50%
Online full text articles	12	41%	1	4%
Music	12	41%	18	64%
Curricula	7	24%	n /a*	n /a*
CD-ROMs	5	17%	5	18%
Other	5	17%	15	54%

*Homeschoolers were not asked specifically about curricular materials.

Libraries reported “other” materials borrowed by homeschoolers, as including “arts and crafts,” “summer reading lists,” and “older, award winning books that are more ‘pure’.” Harkening back to the previous discussion of the two predominant reasons for homeschooling, it would appear that “pure” might be synonymous with lack of violence, sexually explicit materials, and street language – an omission that is more common in non-contemporary literature for children and adults. Homeschoolers reported “other” borrowed materials as including audio books, newspapers, serials, “theme boxes,” microfiche, and musical instruments.

Acquisition Requests

At least one library reported purchasing 25 items at the behest of homeschooling patrons. These were, by far, the most purchases reported. Of the 20 libraries that responded to this question, 40% (8/20) reported having made homeschooler-requested purchases in the previous year. Of course, this number does not tell what percentage of libraries actually received requests by homeschoolers for special purchases. According to the homeschoolers, 18% (5) had made requests of their library to purchase special materials.

Programming and Services

While parents who homeschool usually rely on local public libraries for educational materials, many also take advantage of library programs to supplement their teaching as well as to provide additional social interaction for

their children. Eighty-two percent (23) of the surveyed homeschoolers had numerous suggestions for classes, programs, materials, and services they would love to see their libraries offer. The programs included book clubs, guest speakers, writing workshops, teen clubs, MATHCOUNTS® clubs, and acting clubs. The call for further resources included higher-level materials, homeschooling materials, science equipment, and math resources. Service suggestions included display areas for homeschoolers, packaged unit studies, availability of a homeschool-library liaison, artwork to loan, an updated collection, and less expensive photocopies. Table 4 presents a list of programs and services suggested by homeschoolers.

Table 4 – Programming and Service Suggestions as Indicated by Homeschoolers

Service Suggestions for Homeschoolers	Number of Requests
Programs for Older Children during the day	10
Book Clubs	5
Guest Speakers	3
Writing workshops/ science clubs/ teen clubs	2
Other Programs*	7
No Service Suggestions	5
Unit Studies packaged	3
Higher level materials	3
Other Services**	27

*Other Programs: art club, acting club, kid presentations, MATHCOUNTS® club, music recitals, foreign language club, SAT prep.

**Other Services: homeschooling resources, updated collection, cheaper copies, science equipment, weekly meeting place, greater understanding of homeschoolers, homeschool – library liaison, display area for homeschoolers, math

resources, traveling collection, games to loan, museum passes, artwork to loan, musical instruments, online renewal of ILL, greater networking opportunities, list of local historic sites, wider ILL, more educational CD-ROMs, educator cards.

Of the 29 responding libraries, 90% (26) reported not having programming designed for homeschoolers in particular. Only 10% (3) of libraries reported having created programs specifically aimed at homeschoolers. These included "student groups for research," "library orientation/library skills classes," and a "monthly afternoon home school program called 'Learning to Love the Library'." Among the libraries that did not hold special programming, one librarian hoped "to do this in the near future" and eight explained that homeschooling families avail themselves of general programs and services offered by the libraries.

One librarian stated that her library had tried to offer workshops, but was unsuccessful. The library's homeschool parents, she explained, "did not want to be singled out, but rather chose to integrate with schooled kids." One homeschooler mirrored this sentiment by stating that she has "never been a person to seek out solely homeschoolers for friendships, connections, etc." However, this idea is in direct opposition to 35% (10) of the homeschooling respondents who explicitly asked for programming during school hours. One respondent summarized these sentiments by saying that they "would like to see age-appropriate story times and activities for older children offered during the day. Story hours tend to end once children are of school age and many homeschooled children miss this activity."

Information Technology

As stated previously, all the libraries reported not having a tracking system in place for homeschoolers. Therefore assessing homeschoolers' computer use in the library proved difficult. Libraries do not normally monitor patrons' computer use as that would be an infringement on their right to free access of information. In fact, 28% (8) of the responding libraries commented that invasion of privacy was the reason for not tracking homeschoolers' use of information technologies in the library.

Realizing that there are no tracking systems and that recall of actual services being used by homeschoolers is anecdotal, 72% (21) of librarians reported that homeschoolers used the Internet in their library. However, other than for ILL and account maintenance, only 21% (6) of homeschoolers reported using the computer in the library for services such as printing, online databases, computer games, and the Internet. Homeschoolers were not asked directly about use of technology *in* the library so most of their answers regarding technology use and the library referred to borrowing materials to be used on at-home computers. No homeschooler reported taking computer instruction classes at a library. Table 5

presents homeschoolers reported use of technology by both librarians and homeschoolers.

Table 5 – Technology Use by Homeschoolers as Indicated by Public Libraries and Homeschoolers

Type of Use	Number of Libraries Responding	% of Libraries Responding	Number of Homeschoolers Responding	% of Homeschoolers Responding
Remote Access:				
ILL (OPAC)*	22	76%	26	93%
In-Library Access:				
Internet	21	72%	5	18%
Software	7	24%	8	29%
Email	6	21%	1	4%

*Interlibrary Loan (ILL) is accessed through the Online Public Access Catalog (OPAC).

Interlibrary Loan

By far the greatest and most used technological timesaver afforded homeschoolers in their survey was interlibrary loan (ILL) and the ability to manage library accounts remotely. As stated previously, homeschoolers tend to delve deeply into a topic they are studying and run the risk of quickly exhausting the resources of their local library. Ninety-three percent (26) of the homeschoolers raved about the ability to access their libraries' catalog remotely in order "to research, request, and renew books online." One homeschooler said that her family visits local bookstores, writes down the titles of materials they wish to buy and then orders them through their library or through ILL, saving them "tremendous amounts of money AND shelf space."

Remote access to the catalog helped homeschoolers plan lessons and order materials when convenient for them. Some reported that their local library had

odd hours and so prior to the online access it was more frustrating than helpful to use the library. Seventy-two percent (21) of the public libraries reported knowledge of homeschoolers using ILL. However, at least one librarian stated that servicing homeschoolers' ILL requests was stressing the resources of the library. It would be interesting to know whether this library has online access to the catalog. Future research might look at how homeschoolers' use of ILL affects the overall service libraries offer.

Organization Affiliation

Homeschoolers were asked if they belonged to any homeschool organizations and, if so, how that organization affected their use of the public library. Seventy-nine percent (22) of homeschoolers reported affiliation with an organization. Overall, 46% (13) of responding homeschoolers found that their organizational affiliation positively affected their library use. Most frequently this was because the group met at the library either monthly or weekly for children's classes or parents' meetings; the group met in proximity to the library; or the respondents received recommendations for materials or activities found at the library from members of the group. One respondent reported that "when we just started homeschooling (our daughter was in 7th grade) we were told by an organization member not to purchase much curriculum but to just use the library. That's what we've done."

Conclusions

Homeschoolers did not appear to be placing an inordinate demand on services and materials from public libraries in the Capital Region. One library reported seeking a grant to pay for additional homeschooler-related service requests. It would be interesting to know if the library received the grant and what services it allowed the library to implement. However, most libraries, 62% (18), had not seen an increase in service requests during the twelve month report period.

Homeschoolers appear to be steady users of their public library based on the fact that 68% (19) reported frequent use of more than one library. The literature said that 93% of homeschoolers use their library on either a weekly or monthly basis. **[76]** Homeschoolers appeared to be driven by need rather than the 4 week due dates for library material returns. This represents a vast area of service opportunities awaiting development.

Library Staffing and Service Availability

Such wide variability of staffing patterns among the public library respondents was indicative of size and location of each library (See "Population and Sample: Public Libraries" above). For example, many smaller branch libraries employ no professional librarians, while large libraries have several, specialized professionals and numerous support staff to serve their diverse clientele. The data suggest that most libraries operate with fewer professionals than needed to provide thorough, attentive service. Librarians' comments, such as "[w]e don't have the staff or resources to do programming, computer classes, etc." and "[we] would love to do more, but...have no time to do it at this point," support such a conclusion. Indeed, since many library branches do not operate with a professional librarian on site on a daily basis, comprehensive service for collection development, bibliographic instruction or technology support cannot be guaranteed to any patrons at all times when the library is open, much less to homeschooling families.

Curricular Materials and Beyond

Although traditionally schooled children frequently use textbooks, homeschoolers are not known to rely solely on textbooks. According to one homeschooling respondent, "[r]eading beyond the required text is probably the single biggest factor to academic success, and to being a person to whom learning is important." Curriculum materials include textbooks as well as classical literature, historical fiction, non-fiction books, biographies, educational DVDs, music, and CD-ROMs on various topics. Libraries already supply these materials in large quantities.

The discrepancies, however, between the types of materials homeschoolers reported using against the materials that librarians reported them requesting (see Table 3), shows areas for future programming opportunities. For instance, only one homeschooler reported using online full-text articles, compared with 41% (12) of libraries reporting homeschoolers' use of this resource. Considering the expense associated with online databases, it might prove cost effective to provide instructional classes to patrons, homeschooling or otherwise, on the availability and ease of use of these databases.

Acquisition Requests and Interlibrary Loan

The high rate of interlibrary loan paired with the low rate of acquisitions on behalf of homeschoolers would indicate that libraries are more likely to search for an item outside their walls rather than purchase it for their collection. This may stem from the types of materials that are being requested, either for

purchase or through ILL. As mentioned previously, many homeschoolers use curricula that have a set list of materials. Some of these materials may be out-of-date and/or out-of-print making them less desirable to librarians as related to their libraries' collection development policy.

Homeschoolers study such a wide variety of subjects that it would be difficult for any one library to house all of the needed materials. Homeschoolers rely heavily on interlibrary loan in order to supplement locally available materials on certain subjects. Although some libraries reported being stressed by this high usage, the libraries are likely saving in the long run in terms of not purchasing materials and needing to find permanent storage space for all of the requested materials. This is similar to the homeschooler who reported using the library in order to save money and storage space.

Programming and Services

Beyond staffing issues, there appears to be reluctance on the part of libraries to offer programming to this segment of the population. According to Lerch and Welch, "Why are we so happy when the school invites us into their classrooms and so inconvenienced when homeschoolers request library instruction?" [77] In fact, only 10% (3) of responding libraries stated that they had attempted programming aimed specifically at homeschoolers. Most libraries seem under the impression that homeschoolers do not want to be singled out. However, 35% (10) of the surveyed homeschoolers enthusiastically expressed interest in having programming during "school hours" aimed directly at them and their children. One respondent alone listed fourteen ideas for programming and services that she would like to see implemented through her public library (see Table 4). Overburdened public libraries might be hesitant to offer services to such a growing population for fear of being inundated with service requests that would tax them beyond their capabilities.

Future Research

While this research looked at the current level of services available to homeschoolers through public libraries in the Capital District of New York State, a more systematic study, which includes a needs-assessment survey, should be conducted on the service needs of homeschoolers as well as on the likelihood of future programming aimed at this population. This would look at applicable resources that libraries already hold and those that could be obtained.

Future research might look at how interlibrary loan is being affected by homeschoolers' use. Much of the literature from the 1990s seemed to indicate

that libraries are overwhelmed by the extent of homeschoolers' use of ILL systems. However, since the majority of libraries' catalogs are available online, allowing patrons to perform their own searches and place their own requests, an updated look at this service needs to be done.

Special attention needs to be directed toward a segment of the homeschooling population: high school level students. How can libraries, public and/or academic, help fulfill curricular requirements? Public libraries could form partnerships with local academic libraries in order to broker borrowing rights for homeschooling patrons, especially when those libraries maintain curricular materials. An examination of the local colleges' and universities' libraries' policies on borrowing privileges extended to community members would begin the conversation toward acquiring these privileges for local homeschoolers.

Online distance learning is growing in popularity with homeschoolers, as well as traditionally schooled students, for various reasons including accessibility to accelerated courses and the availability of laboratory simulations for higher-level science courses. [78] Future research needs to examine whether this is an area of service that public libraries want to participate in and at what cost.

Libraries' Positive Impact

Overwhelmingly, homeschoolers reported that libraries play a vital role in their ability to homeschool their children. Examples of the homeschoolers' praise of public libraries' included: "[w]e couldn't have done it as well as we've done it without [the library]," "[t]he library is really all you need to be educated," and "[e]asy to use, accommodating and connected to seemingly endless resources, the public library system is worth its weight in gold." And finally:

Before becoming a homeschool family, we did not use our public library. We purchased all our books, magazines and music. Our personal library grew considerably. When we became a homeschool family last year, in an effort to cut costs, I decided to check out the library. WOW!!! This is my number one homeschool resource for materials.

Service Suggestions

- Library orientation and information literacy classes are a good introduction to programming for homeschoolers. A unique twist on the library orientation class is one where participants submit reference questions beforehand and then, during class, the librarian shows the various reference materials used to find the answers; highlighting that often overlooked portion of the collection. [79] At these classes, librarians could hand out needs-assessment surveys to garner ideas for future programming ideas.
- A homeschool binder that provides information on state laws and contact information for local organizations is helpful for new homeschoolers as well as those newly located to the area. [80]
- Instead of purchasing various curricula packages, libraries could set up, or have a homeschool volunteer set-up, a curriculum swap. This might be as simple as a box in a corner where families who are finished with a set of materials could leave them for another family to use. Or when the library holds its annual book sale, there could be a table for homeschoolers to either sell or swap their old curricular materials. [81]
- If homeschoolers use the library as a meeting place, they act as a captive audience for librarians to conduct book talks on newly purchased materials as well as ready-reference materials. [82]
- Consider designating a homeschool-library liaison, either locally or at the consortium level. At the local level, this liaison is in charge of learning about the libraries' homeschooling patrons' motivations, learning and teaching styles. In turn this liaison educates the staff on the various needs of homeschoolers. [83, 84] At the consortium level, the homeschool-library liaison filters programming and service ideas to the smaller libraries, sets up homeschool resource binders for all the libraries, and maintains open communication with the school districts.

Selected Annotated Bibliography

A Guide to Homeschooling for Librarians, *David C. Brostrom*,
Highsmith Press: 1995

Brostrom offers anecdotes on both the rewards and the challenges from both librarians and homeschoolers on the experiences of working together. Hearing from both sides is vital to a broader understanding of the difficulties experienced by both parties. Although some issues may be outdated, many of the hot-button issues raised in the literature are encapsulated here in this relatively short work (85 pages).

Serving Homeschooled Teens and their Parents, *Maureen T. Lerch and Janet Welch*, *Libraries Unlimited: 2004*

This book gives a great outline on how a truly motivated librarian can market his/her library to the homeschooling community. All the usual suspects are here: Open house/library orientation, online database instruction, information literacy course, book discussions, etc. The difference is that all the ideas are suggested with the homeschooler in mind. For instance, when starting a new program for homeschoolers the authors suggest promoting it as a family program as it might find a wider audience that way. There is a section on the grant outline for the Johnsburg (IL) Public Library's Homeschool Resource Center (HRC).

National Home Education Network website (www.nhen.org)

This site features a section entitled, "What Librarians Want to Know about Homeschooling." This site contains FAQs (and related hyperlinks) directed at librarians. From an overview of instructional methods to the 55 reasons surveyed homeschoolers gave for making this choice, this site seeks to quickly and painlessly educate librarians on the ins and outs of homeschooling.

The Complete Home Learning Sourcebook: The Essential Resource Guide For Homeschoolers, Parents, And Educators Covering Every Subject From Arithmetic To Zoology, *Rebecca Rupp*, *Three Rivers Press, 1998*

Rupp, a homeschooler, has written the 'Good Stuff' column for Home Education Magazine for over ten years on unit studies and various resources. She is currently the resource editor for the magazine. Rupp intersperses her selections with anecdotes taken from her experiences with her own family. This resource guide was used, in conjunction with Susan Scheps' The Librarian's Guide to

Homeschooling Resources, by the librarians at the Johnsburg (IL) Public Library for resource selection when setting up their Homeschool Resource Center (HRC).

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*David Brostrom's name is misspelled in the EBSCO database for this entry. To find this article through EBSCO, either use the misspelled last name (Brostrum) or the article's title, "No Place Like The Library."

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Appendix A: Public Libraries' Survey

Impact of Home Schooling on Public Library Services and Resources:

An Exploratory Study of Capital District Libraries

Barbara Gillen – February 2002

The following survey is part of a research project to fulfill the requirements for a Masters in Library Science at the University at Albany, School of Information Science and Policy. The questionnaire is voluntary and the answers given will remain anonymous. The information you provide is important, even if you have had no contact with home schooling families in your library. Thank you for taking the time to complete this survey.

In responding to the following questions assume a time frame of February 2001 to February 2002.

1. Does your library serve home schooling families?

Yes (Please continue answering questions in this survey)

No (Please skip to question 16)

2. Does your library maintain a system for tracking the number of home schooling families served? Yes No

If yes, how many home schooling families are served per week? _____

If no, what is your best estimate? _____

3. The majority of home schooling families served by your library live in which type of setting? Rural Urban Suburban

4. What age/grade levels of home schooled children do you serve? Please check all that apply.

Pre-school (under age 5 years old) intending to home school

Elementary School/Kindergarten through Grade 5 (5-10 years old)

Middle School/Grades 6 through 8 (11-13 years)

High School/Grades 9 through 12 (14 years or older)

Other. Please explain:

5. How many hours per week does your library staff spend serving home schooling families? 0-2 3-5 6-8 9-11 12 or more

6. In the last 12 months, has this number increased? Yes No

If yes, by approximately how many hours per week?

7. What types of materials have home schooling families requested?
Please check all that apply.

Books

Cassettes

Magazines

Films

Reference works

Curricula

Online full-text articles

Interlibrary loan materials

CD-ROMs

Other. Please explain:

8. How many new items (print and non-print materials) has your library purchased at the request of home schooling families? ____

9. Has your library developed any new programs (e.g., story hours, computer workshops, test preparation courses) at the request of home schooling families? Yes No

If yes, please explain:

10. Has your library modified or discontinued any existing programs in order to meet the needs of home schooling families? Yes No

If yes, please explain:

11. Do home schooling families use the library's computers for any of the following? Please check all that apply.

Internet/World Wide Web

E-mail

___Instructional software

___Other. Please explain:

12. How many hours per week do you spend on computer instruction to home schooling families? ___0-2 ___3-5 ___6-8 ___9-11 ___12 or more
13. Has providing resources and services to home schooling families placed any additional demands on your library staff? ___Yes ___No Please explain:
14. Does your library have a policy or specific plan for serving home schooling families? ___Yes ___No If yes, please explain the policy or attach a copy:
15. Please use this space to share any additional information regarding your professional experiences with home schooling families?
16. The number of full-time equivalent professional librarians in your library: ___
17. The number of full-time equivalent paraprofessionals and volunteers: ___

Please return this survey in the envelope provided to Barbara Gillen by March 4, 2002. **Thank you.**

Appendix B: Homeschoolers' Survey

[SUBJECT LINE:]

Homeschooling Preliminary Questionnaire—Parent Survey

[TEXT:]

Thank you for your voluntary participation in this study of homeschooling families' use of public libraries. The following survey is part of a research project designed to explore the impact of homeschooling families on public libraries, and to explore ways that public libraries can better serve the needs of families like yours. In keeping with human subjects review regulations on confidentiality at the University at Albany, any information that you provide will only be presented in the aggregate in surveys, reports, and/or publications arising from it. No individuals will be mentioned by name, and only this researcher will have access to the individual data you provide. Your email address will be deleted from your questionnaire as soon as it is received.

As an additional safeguard to your personal information, please do not mention any of your children who are homeschooled by name. Additionally, you should feel free to skip any question you prefer to leave blank. In the interest of your information privacy feel free not to mention individual books or materials by name.

Please contact Deborah Lines Andersen at dla@albany.edu or at 518-442-5122 if you have any questions about this questionnaire. If you have any questions concerning your rights as a participant, contact the Compliance Office, the University at Albany at 518-437-4569.

Thank you for taking the time (approximately 20 minutes) to complete this questionnaire. Returning the questionnaire indicates your consent to participate.

Questionnaire Directions:

After pressing the email "reply" key on your computer you should be able to simply type in the space after each question in this email. Please contact Deborah Andersen if this does not work and, if you wish, you may receive by US mail a paper copy of the questionnaire with a stamped, self-addressed envelope to return it.

Since this questionnaire is designed to ask broad questions about public library use, it is formatted as a series of questions for your open-ended response. Please feel free to list items, describe events, or tell stories that will provide details of how you use libraries and how libraries might better serve your needs.

1. Which libraries do you use? Please indicate if you physically go to each particular library, use its materials online, request materials through interlibrary loan, or deal with a library in another specific manner. Please be sure to include your use of public, university and college, church, organizational, or public school libraries.

2. What categories of materials and services have you used from PUBLIC LIBRARIES in the last 12 months? (Categories might include movies, music CDs, books, magazines, encyclopedias, classes, story hours, or interlibrary loan, to name a few.)

3. Has information technology (such as computers, email, and the World Wide Web) changed your interactions with or use of public libraries?

If "yes," how?

4. Are you a member of a homeschooling organization?

If "yes," has that organization affected your use of public libraries, or your choice of public libraries?

5. What additional services do you wish that public libraries would provide for you and your homeschooling family?

6. At any point while homeschooling have you questioned public library policy or asked that it be changed or created to better meet your information needs?

If "yes," how?

7. How many children have you or are you homeschooling?

8. How many years have you homeschooled?

9. Have any of your children applied to college after being homeschooled by you (without returning to public school education before college)?

10. Is there anything else you wish to relate about your experiences with public libraries as a homeschooling parent?

Thank you for taking the time to complete this questionnaire. Preliminary findings will be used to create a second survey that will be administered to a larger group of local homeschooling families. The analyzed, aggregate data from both surveys will be provided to public libraries in the area, and published nationally, to improve libraries' understanding of homeschooling families' information needs.

Background Checks: Hiring Library Staff in the Age of Anxiety

by Susan E. Werner and Colleen Kenefick.

A *bstract*: Careless hiring procedures expose the library and its patrons to significant liability risks and potential financial losses at least for the costs involved in hiring and training. Background checks have become standard practice in almost all professional fields and are being increasingly utilized in all types of libraries because the potential consequences of not performing them can be substantial. This article presents information on the process of performing background checks.

Introduction:

Every librarian has had the experience, at least once, of working with a new employee and wondering, "What were they thinking when they hired him?" While you can't ensure a good workplace fit within any particular library, good background checking will reduce the likelihood of hiring those with deceptive and/or disguised histories.

Background checks have become standard practice in almost all professional fields and are being increasingly utilized in all types of libraries because the potential consequences of not performing them can be substantial. In this litigious society, an adverse workplace incident is likely to result in a negligent hiring or negligent retention suit against the library. Most importantly,

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administrators need to identify high-risk applicants and then to retain documentation demonstrating that diligent effort was extended to ensure a safe workplace environment.

Necessity for Performing Background Checks:

The hiring process is one of the most expensive personnel activities that a library will incur, costing the library a significant expense for the search committee's time, advertising, human resources processing, and training the new hire. By choosing the wrong candidate, the library will be paying a steep price for months or possibly even years to come. While it is expensive to have to fire someone, it can be even costlier in terms of staff morale, damaged reputation, and interruption of work flow if the employee is allowed to stay.

The time spent checking references, educational degrees, and former employers is a necessary but often overlooked part of the hiring process. Libraries need to know much more about applicants than what they write on their resumes. Even with background checks there will never be an ideal hiring process with guaranteed perfect employees, but at least the highest risk candidates should be identified.

The main benefit of a background check is to allow the library to make a more informed hiring decision. All educational, employment information, criminal background, and references provided by the applicant are confirmed to be accurate and complete. Library administration or the human resources department should do background checks not only to verify these facts, but to get a clearer picture of the candidate's former employment responsibilities and performance. A resume or interview itself will rarely give a clear picture of any candidate's performance record.

An estimated 30-40% of job applications and resumes include some false or inflated facts. **(1)** Not all candidates include employment that they left involuntarily, previous criminal convictions are omitted, and employment dates are adjusted, as well as responsibilities and job titles embellished.

Of course, libraries are not exempt from any of the social problems that exist in today's society, with workplace violence accounting for 18% of all violent crime from 1993-1999. "Between 1993 and 1999 in the United States, an average of 1.7 million violent victimizations per year were committed against persons age 12 or older who were at work or on duty, according to the National Crime Victimization Survey." **(2)** The U.S Department of Justice reports that one in every 32 adults has a criminal record. Thus it is also important to check for a criminal record.

Negligent Hiring:

The necessity of performing stringent background checks is amplified by the class of lawsuits based on the negligent hiring and retention doctrine. The library's failure to make a reasonable and/or prudent effort could be considered negligence. Should there be a violent act or wrongdoing by an employee, the library could be held responsible for not adequately investigating their background or qualifications. This is especially true for employees with substantial public contact, particularly with children. Consequences of not doing thorough background checks can result in large monetary settlements as well as bad publicity.

If an incident could have been reasonably foreseen from an employee's past actions, the library that hires or retains this individual leaves their library open to litigation. By performing adequate background and reference checks and maintaining those records, the library will be more secure in the knowledge that they have arrived at informed hiring decisions should they be later scrutinized.

When a library is contacted for a reference, there are several basic principles to remember. Be objective about an employee without commenting on their personal life but instead answering questions objectively and truthfully that are specifically asked. It is best not to volunteer unfavorable or speculative information about employees. If asked, be specific and clear about their job performance and possible reasons for termination.

"The myth that it is illegal or unwise to give out information about former employees is now being debunked by a plethora of recent cases that penalize companies for failing to disclose germane information." **(3)**

Library Policies:

A well thought out policy for background and reference checking should be in place for every library employee regardless of position or level before the hiring process has even begun. **(4)** Policies should include at least such basic procedures as verifying Social Security number, educational background, work experience, and professional references. Candidates will need to submit a signed permission document stating that their background can be investigated before the hiring process can proceed.

All reference checks should be in writing and then references contacted to confirm and elaborate on their thoughts and impressions. All phone calls and any emails should be documented in writing and become part of the permanent

personnel file. Any records of the hiring process must be retained even for applicants who are not hired.

If materials about the background check are removed for the employees privacy, then there should be a record where the background material is held. The laws regulating the length of time for keeping employee records vary by state, but a common rule of thumb is to keep former employee's personnel files for seven years.

Legal Parameters:

Thorough prescreening of candidates is best done by being fully informed about the current federal, state, and local laws while clearly understanding the applicant's rights as well as the library's rights and obligations. The national standards for employment screening are determined by the Fair Credit Reporting Act. The outside company that performs the background check is called a "consumer reporting agency" and the background check report itself is called a "consumer report." The same limits that apply to a personal credit report apply to a background check. **(5)**

The Fair Credit Reporting Act does not restrict what information an employer may use in hiring decisions, rather it focuses on protecting the candidate from inaccurate information in the background report. "The FCRA contains explicit notice and disclosure requirements. In general, an employer is required to preliminarily disclose that it *may* procure a consumer report for employment purposes." **(6)**

The prospective employee has certain rights under the Fair Credit Reporting Act. Consumers have the right to review their credit report and to have incorrect information corrected. The act does state that a consumer reporting agency is not required to remove accurate derogatory information from a consumer's file, unless the information is outdated or cannot be verified. For example, bankruptcies from the date of entry of the order of relief older than 10 years are excluded from consumer reports. Make certain that the information that is being compiled is relevant to the responsibilities of the position. Above all, you must respect an applicant's privacy rights by not investigating too intrusively into an applicant's personal affairs.

The Fair Credit Reporting Act does not apply in situations where the employer conducts the background checks in-house. However, there are disadvantages to conducting in-house background and reference checking. Administrative time will be invested in a project that could be performed more expeditiously and thoroughly by a reliable outside agency that is versed in the small problems that will likely occur doing this detailed work. Besides being a time consuming project,

there are problems with inadequate access to resources and lack of knowledge of changing federal and state regulations that govern this activity.

Federal law does not specifically address the use of arrest or conviction information but, it does define what is considered to be public information and therefore, accessible for background checks. **(7)** The majority of privacy legislation in the United States is enacted at the state level, even though there are some federal privacy laws. State laws differ as to the employers' access to and use of arrest and conviction information for the purpose of conducting checks. **(8)** If the conviction has some bearing on the employment, then some states will allow the employer to consider convictions. Many states treat arrest information differently from convictions. Some states even destroy records of arrest that did not result in a conviction. In contrast, there are other states that will release criminal justice information to employers for almost any reason.

The Equal Employment Opportunity Commission also has regulations preventing arbitrary use of background information. They have cautioned employers that using arrest records to exclude potential employees puts them at risk for Title VII liability because such practices may have a disparate impact on minority populations. It requires employers to have a job related purpose or business necessity for obtaining criminal or credit background information, since any information that is obtained is presumed to be used in making a decision. Employers are prohibited from automatically disqualifying applicants on the basis of a criminal conviction. It is advisable for employers to inform candidates that a prior conviction does not automatically lead to disqualification. **(9)**

Cost and Availability of Relevant Information:

Many human resources departments of larger institutions have contracts with outside companies to conduct their background checks as part of the standard hiring procedure. In the case of smaller libraries without an HR department, the costs of making an uninformed hiring decision may have an even larger negative effect upon the organization and yet the reluctance to spend money on a background check may be strong.

Costs of hiring a specialized agency to conduct background checks have been greatly reduced with continuing improvements in networked information and declining turnaround time. Costs will depend upon the depth of the investigation and amount of time required to prepare a report. The costs of simply verifying an applicants Social Security number will be much less than a detailed report that covers educational background, employment history, criminal records, and character references. Nevertheless, hiring an outside company still does not

totally absolve the employer of verifying the information since mistakes can and will be made.

Even with the ubiquity of computerized information it can be very difficult to locate all relevant information to make an informed hiring decision. Not all publicly available information is in computerized format partly because of a lack of consensus over what should be available electronically and also because of a concern for privacy rights. In the case of court records, individual judges generally decide if records are made public or sealed. Many courts will not post imaged documents online because the imaging software used makes it difficult to verify that confidential information has been excluded. **(10)**

Social-networking sites such as Facebook, Friendster, MySpace, and Tribe allow users to post profiles, photos, and create blogs. Since the candidate is freely posting material about themselves on the Web, they should have an expectation that potential employers can access the material that they post. While candidates may not realize it, they can be giving way too much information to potential employers about their personal lives. As part of the hiring process, this information can be easily found to research candidates and can be considered by employers as long as it does not violate any statutes for employment discrimination. **(11)**

Increasing Your Odds of Success

It doesn't have to be a roll of the dice when faced with the prospect of hiring new staff. Once a realistic background check has been completed, the library has more reliable information regarding the applicants' skills, abilities, workplace personality, motivation, and experience to fulfill the duties of an open position. Since hiring will never be an exact science, selecting an employee is to some extent a gamble with no guarantees that the candidate will be a good match to an individual library.

However, careless hiring procedures exposes the library and its patrons to significant liability risks and potential financial losses at least for the costs involved in hiring and training. It's not simply a game of chance anymore when library administration uses the best available evidence to make more informed decisions in assembling a superior staff.

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Advancing Information Literacy Assessment as a Collaborative Practice

by Thomas P. Mackey

Abstract

This article explores information literacy assessment to provide an overview of institutional history and support, testing practices and tools, and model programs from case studies. Information literacy assessment has strong institutional support as a shared activity and provides valuable insights to educators about student learning in specific courses and programs. A collaborative approach to information literacy assessment is especially useful to library administrators interested in examining the effectiveness of teaching programs and in further developing opportunities for collaboration.

Introduction

The purpose of this article is to review the information literacy assessment literature to gain insights about this process and to identify models for evaluation that have been effective. While the primary emphasis of this article is on the assessment of information literacy courses and programs in higher education, the institutional perspectives and successful models provide valuable insights to educators and library administrators in a variety of settings. Two essential points emerge from this preliminary review of the literature. First, there is significant institutional support for a collaborative approach to information literacy assessment. Second, instructors have access to a range of tools that have the potential to effectively deliver information literacy instruction and to assess learning outcomes. The approaches to assessment presented in this paper are portable to a range of institutional contexts and may generate additional ideas

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on where to start or perhaps how to continue with this process. Several recommendations are made for developing assessment tools, defining learning outcomes, and enabling collaboration based on successful case studies.

Institutional Perspectives on Information Literacy Assessment

A review of the literature suggests that information literacy assessment is a cooperative venture among stakeholders in higher education including librarians, faculty, and administrators. Collaborative information literacy assessment is advanced by the American Library Association (ALA), the Association of College and Research Libraries (ACRL), the American Association of School Librarians (AASL), the Association for Educational Communications and Technology (AECT), and the Middle States Commission on Higher Education (MSCHE).

American Library Association (ALA)

In 1989, the American Library Association discussed information literacy assessment in its *Presidential Committee on Information Literacy: Final Report*. In this early vision of information literacy, the committee members stated that “assessments would attend to ways in which students are using their minds and achieving success as information consumers, analyzers, interpreters, evaluators, and communicators of ideas.” **(1)** This charge is consistent with ALA’s definition of information literacy as a process of “lifelong learning.” **(2)**

The ALA report asserts that “State Departments of Education, Commissions on Higher Education, and Academic Governing boards should be responsible to ensure that a climate conducive to students’ becoming information literate exists in their states and on their campuses.” **(3)** As part of this responsibility, each of these institutions is encouraged “to include coverage of information literacy competencies in state assessment examinations.” **(4)** In many ways, this discussion of information literacy as a partnership in higher education has influenced the way information literacy initiatives have been assessed.

Association of College and Research Libraries (ACRL)

The five standards introduced by the Association of College and Research Libraries (ACRL) provide a comprehensive framework for developing and assessing information literacy initiatives within libraries, colleges, and university settings. ACRL’s *Information Literacy Competency Standards for Higher Education* defines “a range of outcomes for assessing student progress toward information literacy.” **(5)** ACRL emphasized the importance of “local methods for measuring student learning in the context of an institution’s unique mission.” **(6)** As such, the “five standards and twenty-two performance indicators” lead to outcomes that are portable to a variety of educational settings. **(7)** According to these competency standards, “faculty and librarians should also work together to develop assessment instruments and strategies in the context of particular disciplines, as information literacy manifests itself in the specific understanding of

the knowledge creation, scholarly activity, and publication process found in those disciplines.” (8) This is an ambitious and comprehensive vision for information literacy that extends beyond the library community and reaches students within a range of disciplinary and interdisciplinary learning environments, including discipline specific courses.

American Association of School Librarians and Association of Educational Communications and Technology

The development of the *Information Literacy Standards for Student Learning* (ILSSL) for school library media programs was a collaborative effort among members of the American Association of School Librarians (AASL) and the Association of Educational Communications and Technology (AECT). (9) The nine standards are organized into three categories: *Information Literacy*, *Independent Learning*, and *Social Responsibility*. (10) Each category includes three standards and each standard provides indicators, levels of proficiency, and examples that define specific outcomes. (11) The assessment of student learning is a key aspect of information literacy instruction in school library media programs. According to the ILSSL, “assessment can be seen as part of the teaching process itself rather than as a separate task.” (12) This approach provides collaborative opportunities because “the school library media specialist can work closely with teachers in developing assessment techniques and, as time allows, work individually with students to assess their performance.” (13) This ILSSL supports a multi-faceted approach to information literacy assessment that includes such diverse strategies as checklists, rubrics, conferencing, journaling, and portfolios. (14) Each assessment tool is developed in collaboration with the school media specialist and teacher and may involve the student in activities at school, at home, or online. (15)

The Middle States Commission on Higher Education (MSCHE)

Regional accrediting agencies such as the Middle States Commission on Higher Education have played a key role in supporting and promoting information literacy as an integrated learning objective throughout the curriculum. Middle States defines information literacy as a concern that extends beyond the library to the entire institution. In the *Characteristics of Excellence in Higher Education* (2002) information literacy is discussed as “vital to all disciplines and to effective teaching and learning in any institution.” (16) As part of self-study, institutions in the Middle States region must provide “evidence of information literacy incorporated in the curriculum with syllabi, or other material appropriate to the mode of teaching and learning, describing expectations for students’ demonstration of information literacy skills” (17) The assessment of information literacy must focus on clearly stated objectives and learning outcomes.

Middle States reinforces the importance of a comprehensive information literacy assessment strategy that examines the effectiveness of information literacy

throughout the institution. In a guidebook that addresses issues related to the development, implementation, and assessment of information literacy, Middle States argues that “when making the case that students who graduate are information literate, it is the institution’s responsibility to ensure that information literacy goals are defined and that the various elements scattered across the curriculum are identified as part of a coherent whole.” **(18)** Rather than argue for a one-size-fits-all information literacy assessment strategy, Middle States asserts that information literacy instruction should be distributed throughout the institution, in discipline-specific courses and at the library. At the same time, assessment demands the evaluation of these various curricular points as a cohesive entity.

Extending Information Literacy Assessment beyond the Library

Lindauer acknowledges that ALA, ACRL, and regional accrediting agencies, such as the Middle States Commission on Higher education have been instrumental in reinforcing the need for information literacy assessment **(19)** She situates information literacy instruction within learning environments that extend beyond the library and asserts that the “development of information literacy skills in all educational institutions, including public libraries, takes place within a broader environment than just what librarians provide.” **(20)** She also expands the scope of assessment to include “personal experiences that directly contribute to the development of information literate individuals such as specific indicators that capture the quality of the learning environment and learner self-assessment of skills and instruction/learning satisfaction ratings.” **(21)** Lindauer argues for an assessment strategy that addresses “three arenas” including the “learning environment,” “information literacy program components” and “student learning outcomes.” **(22)** This approach recognizes that institutional contexts vary and it considers the unique nature of information literacy programs and initiatives. Student learning is measured based on a range of instruments including tests, assignments, self-assessment, and surveys. According to Lindauer, efforts to assess information literacy ultimately provide opportunities to improve instruction for faculty, librarians, and students.

Standardized Testing:

Project SAILS (Standardized Assessment of Information Literacy Skills)

Efforts have been made to develop standardized tests to measure information literacy skills. For example, Project SAILS (Standardized Assessment of Information Literacy Skills) provides Web-based tests and other resources such as training workshops at a cost to institutions. **(23)** This project started at Kent State University in partnership with the Association of Research Libraries (ARL). The assessment tools were developed using the information literacy competency standards developed by ACRL. The test itself is a multiple-choice format that focuses on twelve skills sets. According to the Project SAILS Web site this online resource “allows libraries to document information literacy skill levels for groups

of students and to pinpoint areas for improvement." (24) According to O'Connor, Radcliff, and Gedeon (2002) the development of Project SAILS provides "an instrument for programmatic-level assessment of information literacy skills that is valid—and thus credible—to university administrators and other academic personnel." (25)

Educational Testing Service (ETS)

A standardized test for Information Communication and Technology (ICT) Literacy has been developed by Educational Testing Service (ETS). (26) According to ETS, the term ICT Literacy is defined as "the ability to use digital technology, communication tools, and/or networks appropriately to solve information problems in order to function in an information society." (27) While ICT Literacy incorporates elements of information literacy, it also focuses on the development of information technology competencies. This approach is intended to build a set of integrated information and technology skills that a student utilizes throughout college. The ICT Literacy test addresses seven proficiencies (define, access, manage, integrate, evaluate, create, and communicate information). (28) According to ETS, this is a 75-minute test that "measures not only knowledge of technology, but the ability to use critical-thinking skills to solve problems within a technological environment." (29) As with Project SAILS, the ICT Literacy test sponsored by ETS is conducted via the Internet and requires a fee charged to participating institutions. Unlike the multiple choice format developed by Project SAILS, however, the ETS test presents "scenario-based tasks" that are intended to create critical thinking and problem solving opportunities. (30)

Standardized testing may provide a useful assessment tool especially for institutions that do not have fully developed assessment strategies of their own. It may also provide a starting point that measures basic information literacy competencies. The pre-defined format of a standardized test, however, does not allow for a great deal of input or modification from educators at the local level. In addition, the limited scope of the multiple choice and even scenario-based tests does not account for the different kinds of instruction that may occur from one institution to another (or from one course to another).

Case Studies from the Literature

Collaborative information literacy assessment is evident in a wide range of learning environments from small colleges to large university systems. A common thread among all of the programs that follow is an interest in developing an appropriate strategy for assessing information literacy programs to improve student learning.

According to Flaspohler an assessment of the information literacy program at Concordia College, provided faculty and librarians with essential information

about their courses. **(31)** Three tools were used for this process including an information literacy questionnaire developed at UCLA, the evaluation of bibliographies created by students, and an in-class writing exercise. **(32)** Flaspohler found that while “students are increasingly computer literate, they are certainly not information literate.” **(33)** This outcome reinforces one of the primary assumptions about information literacy, suggesting that while computer skills and information skills may be connected in today’s information environment, each skill is distinct and must be addressed as part of the overall learning goals and objectives of the course and institution. As Flaspohler suggests “librarians and faculty can and must hold students accountable for resource quality.” **(34)** This further supports the need for the development of critical thinking skills within an information literacy framework. She concludes that the initial assessment of Concordia College provided useful insights about their information literacy program and that “even small changes can lead us toward improved student learning.” **(35)**

Cameron (2004) examines a promising and effective strategy at James Madison University (JMU) that provided useful information about that program. **(36)** An online survey instrument was developed through a collaborative effort among faculty and librarians. The results of this survey led to major revisions of the program, including a specific focus on Web-based instruction. Cameron (2004) argues that “assessment can offer an opportunity for librarians and teaching faculty to develop learning objectives for information literacy, plan instruction that is an integral part of the curriculum, and construct instruments that measure the stated objectives” (207). According to DeMars, Cameron, and Erwin, “having a measure of student learning about information literacy kept the institution focused on direct outcomes rather than guesswork, anecdotal evidence, or student self-perceptions about how much they learned.” **(37)**

After the first two phases of the information literacy assessment program at California State University (CSU), the investigators found that “students usually turn first to the computer to begin their search.” **(38)** According to Dunn this particular finding “underscores the importance of pursuing Web-based reference services that provide real time, interactive reference assistance over the Internet: and confirms the need for imbedded, point-of-use instruction.” **(39)** In a second major finding of this assessment, it was learned that as students advance through their college career their ability “to suggest a variety of resources (e.g., text-based, Internet, people, and institutions) to address their information needs” is improved. **(40)** This finding suggests that student information skills become increasingly sophisticated as they progress through college. This is an important insight that could potentially benefit information literacy initiatives beyond CSU, especially at those institutions where information literacy is integrated throughout the curriculum at all levels of instruction.

Nutefall (2005) describes a collaborative assessment that was developed by faculty and librarians at SUNY Brockport. **(41)** The design and assessment of this 100-level course was built on a partnership between faculty from the Department of Communication and librarians. The content of this core course combined oral communication with information literacy and responded to a SUNY Board of Trustees mandate for information literacy in general education. According to Nutefall “as the course was being developed, assessment was always a consideration.” **(42)** The assessment instrument included an evaluation of scores for two exams (mid-term and final) as well as the evaluation of a “paper trail” writing assignment that required students to document their research processes. The author argued that this combination of exam and writing assignments was an effective assessment strategy because it allowed the instructors to gain a more complete perspective on student learning than simply reviewing exam grades. The writing assignment was also effective in revealing the student’s information seeking behaviors and allowed the librarians to match this self-reflection with learning objectives.

Johnston and Webber (2003) present a case-study for an undergraduate course they co-developed for the Business School at the University of Strathclyde in the United Kingdom (UK). **(43)** Although this case is not a faculty-librarian partnership it does emphasize the importance of instructor collaboration to design and implement a credit bearing course with an integral assessment component. Johnston and Webber describe their assessment strategy as a “multidimensional evaluation” that requires “reflection and synthesis.” **(44)** They assess student learning using a range of collaborative exercises, in-class discussion, a lab requirement, as well as analytical and reflective writing, including an assignment that requires students to evaluate web sites “as an information source; as a marketing tool; and from a usability viewpoint.” **(45)** The instructors also require students to “reflect on the way in which their learning from the information literacy class and their major subjects of study have helped them complete the assignment successfully.” **(46)** According to the authors the information literacy assessment in this course demonstrated that students were actively engaged with “the reflective, analytical intentions of the class.” **(47)** This is a key point for the authors who argue that information literacy should be focused on a deep understanding of course content and the ability to engage in lifelong learning, rather than simply learning a set of separate library skills.

Recommendations

Based on the specific case studies examined in this article, several assessment tools are recommended for information literacy instructors:

- Surveys
- Questionnaires
- Online quizzes, surveys, and tutorials

- Mid-term and final exams
- Bibliography assignments (that require formal research methods and citations)
- Writing assignments (to encourage student reflection on research process)
- Collaborative exercises
- In-class discussion
- Computer lab assignments
- Web site evaluation (and reflection)

As we have seen, these tools are especially useful if developed for specific courses in collaboration with library and faculty partners. The combination of more than one tool is also recommended to develop a set of options that may ultimately provide comprehensive information to instructors about student learning outcomes. Instructors also have access to standardized testing options, but the appropriateness of these tools will depend on the learning objectives of specific courses and would be most effective if used in combination with other resources.

The case studies also suggest that if the assessment tools are effectively integrated into courses and programs, instructors may define the following goals for student learning outcomes:

- Gain a comprehensive understanding of information in a range of environments (beyond basic computer skills)
- Develop a deeper understanding of resource quality
- Advance critical thinking skills
- Enhance ability to conduct more advanced searching techniques
- Encourage student reflection of research process
- Improve information seeking behaviors
- Expand analytical and evaluative skills related to Web resources

While it may not be possible to meet all of these goals in any given course or program, the assessment process has the potential to assist instructors in defining and evaluating several specific learning objectives. As a continual process, assessment provides the opportunity to combine techniques and to modify course objectives over time.

In order to facilitate effective information literacy assessment partnerships, instructors should:

- Envision assessment as an integral part of a course or a program from the start
- Be willing to reach out to librarian or faculty partners
- Work together on both instruction and assessment efforts (including the development of assignments and assessment tools)
- Make time to evaluate assignments and analyze assessment data

- Be willing to modify assignments and teaching methods in response to assessment
- Contact assessment experts or instructors who have participated in this process at your institution (or peer institutions) for advice and support

Conclusion

A review of the literature supports information literacy assessment as a collective responsibility among faculty, librarians, and administrators. A collaborative approach to assessment has been advanced by such organizations as the American Library Association (ALA), the Association of College and Research Libraries (ACRL), and the Middle States Commission on Higher Education (MSCHE). ALA originally discussed the potential participants in this process, from librarians to classroom instructors in partnership with administrators. ACRL clearly defined the information literacy competencies that should be measured by assessment, building on the original proposal of ALA, and arguing for a collaborative process. Accrediting agencies such as MSCHE emphasized the importance of an integrated and collaborative model for implementing and assessing information literacy within colleges and universities. Support for collaborative information literacy assessment has also been promoted by the American Association of School Librarians (AASL) and the Association for Educational Communications and Technology (AECT).

As we have seen in specific case studies, information literacy assessment may take many forms but at the core of each plan is an effort to consider the unique context of information literacy at the institution and to formulate an appropriate strategy. Through this practice, educators grapple with a definition of terms, develop a reliable assessment instrument, implement a plan in one phase or in several phases over time, and analyze findings in a way to ultimately improve the teaching and learning environment. Input from faculty, librarians, and administrators is essential to this process.

Institutional assessments must consider strategies designed by instructors to effectively measure information literacy learning outcomes while considering the perspectives of individual students within distinct course formats. Ultimately, developing a multi-faceted assessment strategy will provide the opportunity to strengthen faculty-librarian alliances in the service of effective teaching and learning.

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Mission Possible – Dealing Effectively with the Explosive Customer

by Peter Lisker

Abstract: Customers get angry. From initial reaction through resolution our responses should be consistent and fair. This article explores the emotions and responses that shape acceptable outcomes, save face and insure a positive customer service transaction.

Introduction:

It doesn't happen often, thankfully, but every now and again I feel I should become a member of our local EODT (Explosive Ordinance Disposal Team or bomb squad). I've seen people from pleasantly irate to fully blown angry and everything in between yet continue to enjoy, after 24 years of public librarianship, being on the customer service front lines and wouldn't want to be anywhere else.

A Little Background:

As managers and librarians we are first and foremost service providers. When confronted with a customer that has been subjected to poor service or who disagrees with library policies, our instinct is to identify the problem and immediately provide or negotiate a solution. As logical and efficient as this might seem we are dealing with complex and variable human personalities with a full range of human emotions. In order to have our best chance at achieving a mutually acceptable solution, we need to be cognizant of the emotions and needs that underlie the actual or perceived problem.

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As Kent Burnes advises in a customer service Powerpoint presentation: "...customers need to be heard, understood, empathized, respected and valued. They need to feel important and that their business is appreciated, taken seriously, guaranteed immediate action and assured that the problem won't happen again and, in the case of retail business, compensated in some way." **(1)** We may naturally assume that the most effective approach is simply solving the problem; however, by including attention, appreciation and empathy into the solution we recognize additional human characteristics and may create a lasting bond with the customer as we invoke the law of reciprocity **(2)** so that they want to also give us attention and empathy.

According to Angi Semler in the article Anger Management, there "are two critical guidelines to remember: everyone wants to feel important and know they matter and, in a confrontational situation, every party's goal is save face." **(3)** In order to turn a dissatisfied patron into a satisfied one we need to understand these two human needs. Success at fulfilling these needs will facilitate the creation of lasting relationships with our customers.

Satisfaction Guaranteed:

Because it is difficult to maintain clarity and control under stress patron needs fulfillment can best be achieved by process or procedure. By following a "script" we lessen mistakes and approach each transaction uniformly. Here are two methods that your staff members may find helpful in creating policies and procedures. The first is called the "LASTING" Method: Listen, acknowledge, solve, thank, investigate, negotiate and get back to work.

The LASTING Method:

First **listen** attentively. Allow the customer sufficient time to state their problem without interruption or comment. It's human nature to formulate a response as someone speaks so train yourself to focus on the individual by maintaining eye contact and using non-verbal gestures such as vertical nodding and serious facial expressions. Now is not the time for a goofy grin. When faced with an extremely agitated person, imagine a balloon that needs to have the air let out slowly, not popped! Let the explanation or tirade run its course, don't interrupt – listen!

Acknowledge the problem by restating the complaint and asking for confirmation. I've heard many convoluted and lengthy stories which, when dissected into individual parts, had merit. Asking for details, re-defining the problem and sorting out specific issues are an integral part of listening and acknowledgement. Be certain that you fully understand the problem before formulating a response.

Solve the problem. Do what needs to be done and get it right. If it's an error on a customer record, don't just say "I'll take care of it." Do it in their presence and show them the correction. Apologize for the error and if appropriate, mention how you will try to prevent reoccurrence. If appropriate, ask the customer if they are satisfied with the outcome.

Thank the customer for bringing the issue to your attention. Now is the time to give them your best smile, possibly a handshake and thanks for continued support. Encourage the customer to use the collection.

Investigate. Complicated or policy issues may require coordination with another department, supervisor or unit. If the problem necessitates outside consultation address this with, "I need to talk to...and work something out. Can I call or email you later today?" Write down as much information as you can. In the heat of the moment it's easy to drop a phone number digit or write an email address illegibly. The more information you have the safer you are to re-connect with the customer. Asking for time to investigate gives everyone a little breathing room and shows the customer that you're taking their issue seriously.

Negotiate. Negotiation implies that both parties give up something to gain a neutral or satisfactory conclusion to which both agree. If you offer a reduced fine to which the customer does not concur, you have not negotiated an acceptable solution. Negotiation may include suggesting a renewed search at home and in the library, compromising on a fine or a one-for-one replacement for a lost or damaged item. When negotiating, the outcome should allow all parties to save face.

Get back to work. Don't hold a grudge or have the expectation that the next time the person stops by they'll be looking for blood. Happily, some of the most irate customers I've dealt with have turned into our best customers.

Question, Confirm, Provide, and Check:

Another method comes from *Sales & Marketing Management*. It involves only four steps: Question, Confirm, Provide, and Check.

According to Richard Whiteley (4) sometimes the real first step in the process can be to get people who are unhappy with our service to tell us. In his words, "encouraging a disgruntled customer to complain sets the stage for resolving the problem and restoring buyer confidence". First understand the problem or, "**Question**": the objective is to clarify the complaint or objection to make sure the proper solution can be created. Second, "**Confirm**": here the objective is to assure that what has been learned in the questioning stage is the same as what the person complaining meant. This step is the transition from gathering

information to providing a solution. Third, **“Provide”** : The objective of this step is to create and provide a suitable solution to the problems uncovered in the questioning and confirming steps.

The final step is: **“Check”**: The objective of the last step is to test with the customer that the proposed solution will indeed eliminate the complaint or objective and restore buyer confidence. If this outcome isn't achieved the first time around, go back to the questioning stage and try again.

Again, it's a common and understandable mistake to ignore step one, i.e. encouraging — because sometimes the customer isn't ready yet for the problem to be addressed. Remember, the customer really has two problems. One is whatever is wrong with the product or service. The other is that he or she is upset. Step one handles the upset. Steps two through four handle the product or service defect” **(3)** Whether you prefer the mnemonic LASTING; Whiteley's question, confirm, provide and check strategy, or your own method, having concise steps to follow will help address the problem objectively. Remember that you may be the recipient of a person's anger but they are probably not specifically mad at you, just the circumstances.

Notes on Resolutions:

It should be stressed that both the patron and staff member must retain importance and save face. Embarrassing as it might be to find returned materials on the shelf it's an easy fix and a great way to build bridges. Apologize for the inconvenience, clear the record, reassure the customer that, “we try our best to get everything checked in properly.” Most times when faced with this scenario, customers tend to be more relieved than angry. If the item cannot be located, offering alternatives may be the solution. We've all heard stories of customers locating materials in the trunk of the car, under a bed or between couch cushions, which I will share with a customer who appears open to the suggestion. A response with a touch of humor can help ease this situation, “You look and we'll look, I'm sure it will turn up somewhere.”

Fines, no matter how minimal, should be handled as discretely as possible. Customers do not want their fines broadcast to everyone in earshot. Keep your voice low, offer a minimal payment and, when possible, compromise when appropriate.

Damaged materials should always be returned to the customer following payment. Consider allowing patrons to replace lost or damaged materials one-for-one.

Complaints regarding mistreatment by staff members are possibly the most challenging. For most situations, I suggest a blanket apology to the customer with an assurance that you will follow-up with the staff member. Hopefully you

will have achieved an outcome that satisfies the customer and allows all parties to save face. After all is said and done, it's important to reflect on the transaction and share the good and bad with supervisors and other staff members.

Finally, after each encounter, whether the solution was easy, required a bit of "magic" or not solved, it is a good idea to step back and reflect on how things happened in the first place. Were policies and/or procedures violated; are policies and procedures unfair, bad or wrong; was a precedent set that will affect customers and staff members? The process of reflection provides a positive means to decompress following an emotionally charged encounter.

What About Belligerent Customers:

The line we should not allow customers to cross is offensive, belligerent and threatening behavior which in my library is cause for immediate removal from the building followed by a written report of the incident. This standard works in two ways: first staff members are secure in knowing that they will use every available means to help with a problem but not be subject to extremely rude and threatening behavior and second, other customers see that that behavior is not tolerated thus creating a safe environment for both customers and staff members. On the very rare occasion when this has occurred I force myself to be as calm as possible and ask the person to leave the building and return only when they can remain civil. Talk calmly but insistently and never, ever touch the offender. Should the reverse happen, this is clearly a situation that may require a call to the police.

Turning Lemons into Lemonade: An Example

I arrived one morning to find a note on my desk regarding a conflict between a staff member and customer. Telephone tag left the issue unresolved until she came in the following week. I approached her directly, introduced myself and asked about the incident. Having read the note I was aware of the general circumstances but allowed her to communicate her version uninterrupted. I thanked her for bring the incident to my personal attention, noted that I tried to get in touch with her leaving messages on the home answering machine (which she acknowledged receiving) and apologized for the problem. We continued our discussion of the incident resolving the issue to her satisfaction. I'm not sure how we got on the topic but the next thing I knew she's telling me that her "other job," besides mother to two small children, is an architect and we're talking about new a new floor, ceiling and other building needs. This conversation has since progressed to volunteering to develop a master renovation plan. Things don't always work out this well, but at least a foundation for the future is laid with good will.

It Takes Practice:

Dealing effectively with angry customers is a skill that comes with experience. We help our staff members by devising procedures and strategies that allow for flexibility and make them feel secure in the knowledge that we will support them during and following the encounter. So much of what we do revolves around, "being on the same page." This is especially critical when addressing customer outbursts where teamwork and common goals become critical factors in dealing with angry customers. Making sure that all staff are well trained not only in following library policies but also in problem resolution can go a long way in creating more satisfied patrons who believe in the importance of the library.

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PILOT Payments – a potential revenue source for public libraries

by Jerry Nichols

A ***Abstract:** There are funds generated from tax-exempt entities that are intended to be used to support various government services, such as libraries. Using New York State in general, and the Brentwood Public Library in particular, this article illustrates the amount of revenue collected with the intent of funding local libraries. Much of this money does not find its way to the library. The article alerts library administrators to the possibility that these funds may be available to them.*

Introduction:

New York State law, similar to most other states, provides for a variety of mechanisms for taxing jurisdictions such as counties and towns to receive payments for government services from otherwise tax-exempt entities. These payments in lieu of taxes – commonly referred to as “PILOTS” – are often the result of individual negotiations between the lead taxing jurisdiction and the tax-exempt organization. Such arrangements may vary greatly in detail from one situation and region to the next. Quite often public libraries have been overlooked in such negotiations or, in some cases, do not receive funds meant to be passed through to them by another taxing jurisdiction.

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Common Types Of Pilot Arrangements:

Federal institutions

Nationally, one of the most common types of PILOT programs is between the United States federal government and local governments to lessen the impact of the cost of services provided to a federal institution. Subject to local negotiations, these agreements vary and apply to many types of federal operations. In one region, Suffolk County, New York, payments are made on behalf of the Brookhaven National Laboratory to the Town of Brookhaven, the local school and library districts. Similarly, a small payment is made to the local school district on Fire Island for educating children of the personnel based at the U.S. Coast Guard Station maintained on the island. Ironically, state institutions, such as the State University of New York at Stony Brook, often make no payments to local jurisdictions though they may require significant services such as fire protection and educational services for the families living in on-campus graduate housing.

Special Uses

In New York State, as well as most other states, several special types of facilities are exempt from real estate taxes. These include airports, nuclear generating facilities and other public service facilities governed by governmentally established authorities. However, the owner or public authority holding title to these facilities is required to make PILOTs to local jurisdictions based on the taxable value of the property prior to the granting of the tax exemption. Likewise, businesses located on these properties, particularly within an airport, are also liable for such payments. Though these properties are no longer considered on the tax rolls, such PILOTs can make up a substantial revenue stream for the local taxing jurisdictions.

Industrial Development Agencies

The practice of enticing new businesses or encouraging the expansion of existing corporate or industrial facilities to a locality through tax incentives is widespread throughout the United States. There are a variety of tax abatement strategies used by local governments to reduce, for a time at least, the tax impact of the construction or expansion of corporate or industrial facilities. The theory behind this strategy is that the jobs created by this business' expansion will more than offset the loss of additional real estate taxes in the short term. A common

methodology is the establishment of tax exempt Industrial Development Agencies (IDAs) by local governments as a part of a comprehensive economic development plan. These IDAs are permitted to sell tax-exempt municipal bonds on behalf of commercial and not-for-profit enterprises within the area they serve. In effect, the IDA then becomes the mortgage holder for the improved property and, as a governmental authority, is exempt from real property taxes on the improvements.

The New York State Example

In New York State the authorization for PILOT agreements is found in N.Y.S. General Municipal Law Section 874. This law allows a local IDA to finance eligible projects and determine a schedule of payments “in lieu” of the exempted taxes to the various tax jurisdictions affected by the exemption. Most programs require the business to pay a percentage of the true tax burden with a set increase each year until the tax levy is met and the bonds are repaid. The increased value of the property in question is not reflected on the locality’s tax rolls during this period. Typically such exemptions may last for ten years, with the tax exemption decreasing each year while the PILOT payments “make up” the loss in tax revenue to the various districts. At that point the property becomes fully assessed and taxable and PILOT payments cease. Public library districts with a tax levy in place when the exemption is first granted would generally be eligible for such payments.

The additional payments made during this period of tax abatement to public entities are considered PILOTs and are paid outside the normal tax revenue stream to the eligible institutions. Though many public libraries in New York State and elsewhere derive their primary funding from local real estate taxes, many of them are not aware of, nor fully share in, the benefit of PILOT payments. This appears to be especially true in the case of economic development initiatives provided to corporations by IDAs and other such economic development programs. This, in spite of the fact that such PILOTs may, indeed, have been collected on the Library’s behalf.

Even though library taxes are normally considered in the calculation of PILOT payments, the payment procedure varies by each IDA. Some IDAs send the appropriate payments directly to the affected libraries. Many, however, send these “library” payments to the local school district since (in New York State) it is generally the school district that collects the local taxes for the library. They leave it up to the school district to pass the funds along to the library.

Case study: Brentwood Public Library:

The Brentwood Public Library, in Brentwood, New York, is a progressive suburban library that serves a diverse population of approximately 70,000. It is located within the Town of Islip and County of Suffolk. Chartered to serve the

residents of the Brentwood School District, the library holds an annual trustee election and budget vote in the library separate from other local votes. More than 90 percent of the library's \$6 million annual operating budget comes from real property taxes. The demographics of the district and readily available industrial and commercially zoned property make it a prime candidate for economic development initiatives by the Town of Islip through its IDA.

Though for several years officials from the library had suspected that they might be missing out on PILOT revenues, repeated inquiries to the school district and town offices received no response. In December 2003, as a result of persistent requests by the Suffolk Cooperative Library System, the region's public library cooperative, the Town of Islip IDA provided information on the PILOTs that had been collected on behalf of the town's public libraries. For the year 2003 over \$256,000 in PILOT payments had been collected for the public libraries in the town. Brentwood's share was \$108,977. The Islip IDA had, as in past years, sent the libraries' payments to the local school districts since that was the normal procedure for the distribution of library taxes. Only two of the eight libraries had received their payment. Since 1997, over \$1,048,000 had been distributed in PILOT payments for local libraries. Only \$50,000 had been actually received by the local libraries. The Brentwood Public Library received none of the \$322,634 collected during that period on their behalf. It had been kept by the local school district. At that time an additional \$94,133 was scheduled to be paid to the school district for the library in 2004.

Ultimately the library recovered a portion of these funds from the school district and executed a legal agreement detailing the procedures for future payments and the provision for payments in anticipation of taxes by the school district to the library in future years, thereby providing an advantageous cash flow for the library. Similar results were gained by neighboring libraries, though not without considerable legal and political wrangling.

Conclusion

All public libraries would be well advised to thoroughly investigate the economic development tax incentive programs at work in their region. If library officials were not included in the negotiation process for tax abatements regarding these initiatives, they would be well advised to determine their legal standing and seek to become an active participant. Every effort should also be made to track any PILOT agreements in the region to determine the library's rights to such funding and to insist that library services are an essential public service worthy of consideration in the negotiation of PILOT agreements.

It is suggested that library officials take the following steps to determine their eligibility for funding under PILOT agreements:

- Research state and local laws regarding tax exemption incentives for industrial and commercial development;

- Determine the existence of any state or federal institution within the Library's service boundaries and request information from the appropriate taxing jurisdiction regarding PILOT payment agreements;
- Contact county, town and other regional municipalities for information on economic development programs;
- Request information from regional municipalities on economic development tax exemption programs in your Library's jurisdiction. It may be necessary to file Freedom of Information (FOIL) requests to obtain this information. Be certain to request historical information on such programs.
- If it is determined that other taxing authorities (schools, villages, towns, etc.) in the Library's jurisdiction are receiving PILOT payments, request (FOIL) a copy of the contract agreement to determine if the Library's tax appropriation has been considered in the PILOT payment calculations;
- If it is determined that the Library should have been eligible for past PILOT payments contact knowledgeable legal counsel and attempt to negotiate a reasonable settlement for all parties;
- Make every effort to assure the Library is included in all future PILOT agreements.

JLAMS Book Review

REVIEW: **Leadership Basics for Librarians and Information Professionals** by G. Edward Evans and Patricia Layzell Ward , *The Scarecrow Press, Inc.*, 2007. ISBN: 0-8108-5229-2 / 978-0-8108-5229-7, 256 pages.

"Leaders should be, by their very nature, optimistic." This passage is found early on in a new book entitled ***Leadership Basics for Librarians and Information Professionals***, published by Scarecrow Press. I confess that, as someone working in a profession buffeted by dramatic changes in technology and user expectations, chronic funding challenges, and an assertive and independent-minded new generation of staffers, I've sometimes found optimism in somewhat short supply. The authors (G. Edward Evans and Patricia Layzell Ward) quickly move past platitudes, however, to provide a wealth of valuable research and recommendations on the subject of leadership. It is likely that most of today's library leaders attained their positions and manage their affairs based more on practical experience and 'seat of the pants' instinct than by having formal grounding in the history and principles of management and leadership. It's also likely that those leaders (especially the more seasoned ones) might be skeptical that an academic treatment of the topic would have something to offer. I can report, though, that the dedicated reader (this is not a light and breezy work!) will be rewarded with some interesting insights and tips, and perhaps a new-found openness to introspection and innovation.

The book is divided into three main sections. The first section (called Background), develops some definitions of leadership, reviews past literature on the topic, and explores ways to assess and develop one's leadership potential. The central part of the book covers team-building, honing political skills, strategic thinking, and an insightful chapter on E-Leadership. The final section, drawing on survey data and the authors' experiences, focuses on the difficulties ('banana skins') and success factors that leaders frequently encounter.

Although leaders in all organizations share common skills and challenges, I would have preferred to see more library-related examples of these topics. That aside, I found this book to be enlightening and thought-provoking. ***Leadership Basics for Librarians and Information Professionals*** will make a valuable addition to the manager's bookshelf.

Edward Falcone, Deputy Director
The Yonkers Public Library